2010

HSU

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NEW EMPLOYEE MANUAL

Index

Network Information

Logging into the Network:

    After turning on the computer, windows will load up and display a login screen. On most computers, it will ask you to press Alt + Ctrl + Del. After pressing all 3 buttons at the same time, the screen will change and ask for your username and password. Your Username and password should be provided to you when you become an employee. Typically your username is the first six letters of your last name followed by the first initial of your first name.   The default password is the first four letters of your last name followed by the last four digits of your Social Security number.

    If someone else has already logged onto that computer before, sometimes it will have someone else's username listed. If so, then you will have to select "Switch User" button before it is possible to put in your username.

Domains:

    On campus, we log in through a domain. Most faculty computers are already set to log in under the proper domain, but sometimes it gets changed. You can check if it is set properly by looking under the login bars. It should say "HSDOMAIN". If it says something else, then you will have to change it. To change the domain, type HSDOMAIN\ before your username. So if your username is williab, you will type HSDOMAIN\williab as your username.

Computer Security:

    Because all faculty and staff members have access to important information, it is important to make sure that no unauthorized individuals can access a computer under your login information. This means that you should never tell your login information to anyone. If you ever receive anything asking for your information, call the helpdesk at (870) 230-5678 before you respond.

    Secondly, do not leave your computer while you are logged in. It is possible for someone to easily get or change your information if you leave your computer logged in while unattended. To avoid this situation, you should always either log out or lock your computer whenever you leave it unattended.

Changing your Password:

    If you feel like you need to change your password, this can easily be accomplished. After you have logged in, you need to press Ctrl + Alt + Del. This will bring up a screen with 5 possible selections. Select **Change a Password…** and a screen that looks similar to the login screen will appear. Fill in the information as requested and then press enter. The password has now been changed.

    Keep in mind that there are certain guidelines to make passwords as secure as possible.
1. You are not able to use a password that you have used recently.
2. You should make it 8 or more characters long. You may want to use a phrase that you like.
3. You should include at least one number and one symbol.
4. If possible, have some characters capitalized while others are lower case.
5. The most important step is to remember your password. It will be identical to how you typed it in.

Locking your Computer:

You need to lock your computer whenever you leave your desk, but you will not be gone long enough to log off. You will have to log back in, but all of your programs and folders will still be opened. There are two easy ways to do this:
1. The first uses the "Windows Button" on your keyboard. You will need to press the "Windows Button" and the letter "L" at the same time. The "Windows Button" is found between the Ctrl and the Alt keys, but keep in mind that not every keyboard has a "Windows Button".
2. The second method requires you to press Ctrl + Alt + Del and then select the option to **Lock this computer**.

Network Storage:

There are two primary locations to store information on the network. They are the X drive, and the department drives.

The X drive is a network hard drive that is accessible from anywhere on campus. Every student, faculty, and staff member has access to their own space on the drive. You can only see what you have placed on the X drive if you log in with your own login information. To access this drive, follow these directions:
1. Select the windows start button on the bottom left of your screen.
2. Select **Computer** on the right side of the menu that popped up.
3. In the new window that pops up, there should be an option that says X:. Double click the X: to see anything that you have stored there. If you cannot see it, please contact the helpdesk at (870) 230-5678 for assistance.

The department folders are areas where data is stored for certain departments. This can be found on the M drive. Inside the M drive are numerous folders for each department. These folders have a security feature that only allows those who have been given permission to open the folder. To access the folder:
1. Select the windows start button on the bottom left of your screen.
2. Select **Computer** on the right side of the menu that popped up.
3. In the new window that pops up, there should be an option that says M:. Double click the M:.
4. Now find the folder for your department and double click it.
5. If you cannot see the M:, please contact the helpdesk at (870) 230-5678 for assistance, but if you do not have permission to open your department's folder, please contact the head of your department.

Basic Computer Info

Desktop:
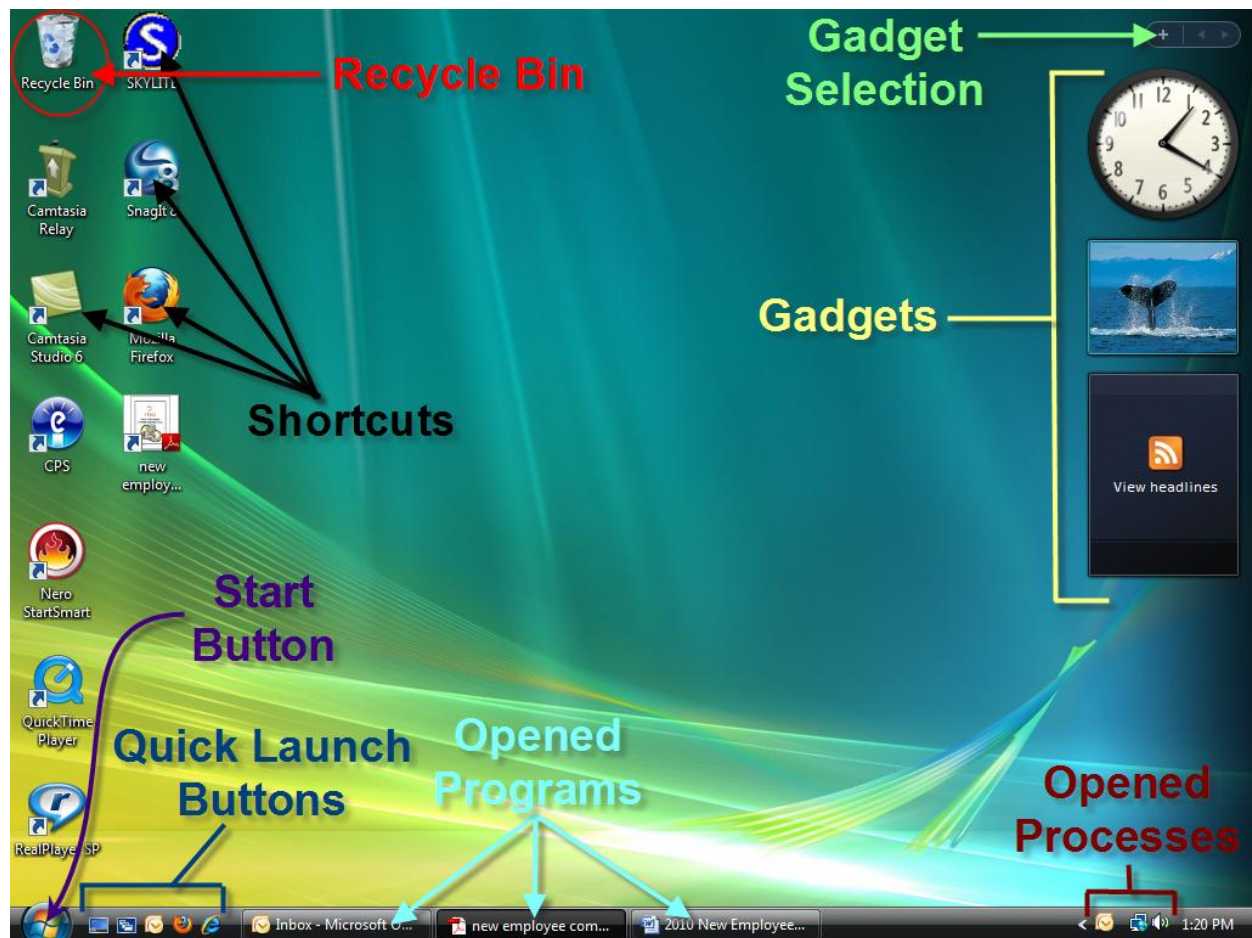
- Gadgets – Different "gadgets" that are added to your desktop for convenience.
- Gadgets Selection – This is the quick button that is available if you desire to change what gadgets are present on your desktop. Some other choices include a calendar, sticky notes, a news updater, etc…
- Opened Processes – These are all the processes or programs that run in the background. The most important programs found here are the sound and COMODO Antivirus.
- Opened Programs – These are programs that you currently are working with. Selecting the icon will either minimize, or bring forward the program.
- Recycle Bin – After you have deleted a file or object, it will be sent to the Recycle Bin. If you delete something and you did not mean to, check the recycle bin. If you right click a file inside the recycle bin you can select **Restore** to restore the file. Deleted files will be saved until you decide to right click the Recycle Bin and select **Empty Recycle Bin** or until you run out of space to store the deleted file.
- Quick launch buttons and Opened programs- these are the same thing with Windows 7.

- Shortcuts – These are icons on the desktop that allow you to open a program, file, webpage, or folder without actually navigating to the folder or address that it is saved to. You can tell that it is a shortcut because it has the arrow on the bottom left of the icon. There are two easy ways to add a shortcut to your desktop:
  - If you have already found the program, file, webpage, or folder:
    - Right click the object that you want a shortcut for.
    - Select **Send to**.
    - Select **Desktop (create shortcut)**.
    - It should be available on your desktop.
  - If you have not already found the file:
    - Right click on an uncluttered portion of the desktop.
    - Select **New**.
    - Select **Shortcut**.
    - If you want a shortcut to a webpage, type in the webpage here. If not, select **Browse…**in the new window and then find the file, folder, or program that you want for the shortcut.
    - Now select **Next**.
    - Name the shortcut something that you will recognize.
- Start Button – This is how you open up the Start menu. This portion of the desktop allows you easy access to everything on the computer.

Start Menu:

The Start menu has adapted over the years to become more organized yet versatile at the same time. Immediately above the Start Button is a bar that you can type into. This is a Search Bar. If you are trying to find a file or folder, but you cannot find it, you can use this Search Bar. All of the results appear in the white portion of the Start Menu. Closing the Start Menu and reopening it will clear the search.

Immediately above the Search Bar is a portion that says "All Programs". If you click here (or mouse over it for a few seconds) a list of programs will be displayed in the white area above it. Any program that you have installed on your computer should be listed here. If something is not found here, it is most likely not on your computer. Call the helpdesk if something should be listed here, but it is not.

In the white portion above the "All Programs" is a list of popular programs. These are programs that you have used the most often in a fairly recent timeframe. In other words, these are most likely the programs that you use on a regular basis. If you do not want one of these programs in the list, just right click it and select "Remove from this list".

The right side with the black background is where a lot of the administrative locations are listed. As a faculty or Staff member, the most important ones are **Documents**, **Recent Items**, and **Computer**. **Documents** is the default location where all your files will be stored. **Recent Items** is a list of all the recent programs, files, videos, and audio that you have used, watched or listened to recently. **Computer** is where all of your storage devices are listed.

Storage devices:

We have already touched a little bit on storage devices. Inside the **Computer** window, there is a list of all of the storage devices on the computer. Two of those that we have already discussed are the X: and the M: (See Network Storage). Some other common storage devices are the primary hard drive (C:) and then flash drives or other external storage devices (typically labeled starting with E:).

The primary hard drive will always stay with the computer. If anything is stored here, then it will only be accessible from this computer. This is also the default drive to install files, programs, and other data.

External drives are used to store data that you would like to either carry with you or transport to another location. The most common form of an external drive is a flash drive. To use these drives, you need to plug it into a USB slot and then wait for it to be properly set up (Windows Vista and above should automatically install most any external drive). After it is set up, it should show up in the **Computer** window (see Start Menu if you are not sure how to get to the **Computer** window).

Printing:

It is possible to print documents in most all programs by selecting a **Print** option. Whenever you select this option, it will always set it up with the default printer. If you wish to change which printer is to be used, then you must select it in the drop down menu. If you find yourself doing this a lot, then you might want to consider changing the default printer. You can do this by:

1. Selecting the Start Button.
2. In the black portion on the right, select **Control Panel**.
3. On the left side, make sure that **Classic View** is selected.
4. Find **Printers** and then double click it (it is alphabetical).
5. Find the printer that you want to make the default printer and then right click it. Now select **Set as Default Printer**.
6. You should see a check mark by the printer. Please call the Helpdesk at (870) 230-5678 for assistance if you don't see the printer or if you have trouble with any of these steps.

Task Manager:

The Task Manager allows you to view every program and application that is currently running. It also shows you how much of your resources each program is using and allows you to adjust priorities or even shut down a program. Many might think that this is only something for a tech to use, but it is practical for anyone. If a program freezes, then it is possible to open the task manager and determine if a program is just being slow or if it has truly frozen.

If a program has the text "Not Responding" next to it, then it is not running properly. At this point there are 2 options:

1. Wait a little longer and hope that the program resolves the issue by itself (this is only possible as long as the issue is something that it can easily recover from).
2. Close the program by right clicking it and selecting "End Task". This will begin the process of forcefully closing the program. Keep in mind that any unsaved data will be lost using this method.

Computer Maintenance

Disk Defragmenter:

   The process of Disk Defragmentation reorganizes the hard drive so that similar files are grouped together. An easy way to think of it is to pretend that your hard drive is a library and all of your data are books. When the computer puts information on the hard drive, it just puts the data on the drive. Following our library example, this means that it will just put them on the first shelf that is available. If you do not have a lot of data (books), then you can easily find what you are looking for even if it is not well organized. If it is almost full, however, then it takes longer to gather all of the proper data (books). Continuing our library example, defragmenting is like rearranging a library full of books to their proper locations.

   As you can assume, this process can take a while to complete. If you have close to a full hard drive and you have never defragmented before, this process may take a multiple hours. If you keep up with it or just do not have a lot of data, then it may take only a matter of minutes. It is recommended that you defragment your hard drive if you fall under one of these conditions:
1. Your computer appears to be running slow or sluggish.
2. It seems to take an unusually long time to open a file or program.
3. You have installed/added a lot of data since your last defragmentation.
4. You have uninstalled/deleted a lot of data since your last defragmentation.
5. You have not defragmented your hard drive within three months.

   The process to defragment the hard drive is:
1. Select the Start Button.
2. Select **All Programs**.
3. Select **Accessories**.
4. Select **System Tools**.
5. Select **Disk Defragmenter**.
6. In the new window, select **Defragment now…**

Disk Cleanup:

Disk Cleanup is a process that removes unnecessary files. Some of these include the Recycle Bin, Temporary files, and unused cached data. To run the Disk Cleanup:
1. Select the Start Button.
2. Select **All Programs**.
3. Select **Accessories**.
4. Select **System Tools**.
5. Select **Disk Cleanup.**
6. In the new window, select which files to clean (Definitely select Temporary files and Temporary Internet files. The others are up to you). Then select "OK"

System Restore:

   System Restore is a system that can be helpful for any faculty or staff member. There are times that an error may occur in the system that prevents windows from working properly. If this happens, it is sometimes possible to restore the system back to a previous time when it was working properly. Without System Restore, the system will most likely have to be wiped clean in order to fix a major issue. That would result in the loss of your entire C: data. Here are the steps to create a restore point:

1. Select the Start Button.
2. Select **Control Panel**.
3. In the window, select **Backup and Restore Center**.
4. In the new window, the "System Protection" tab should be selected. Now select the drive that you would like to back up (typically C:).
5. Select **Apply**.
6. Select **Create…**

Important

Even though System restore can prevent some situtaions where the system has to be wiped, it is still possible that it may be required. Always back up your data!

If you feel like you need to restore the system, there is the possibility that there may be another possible solution. Please call the Helpdesk at (870) 230-5678 for assistance.

Symantec Endpoint Protection (Antivirus)

   Symantec Endpoint Protection is an antivirus program that helps detect threats and can also remove most forms of malicious software. Most faculty, staff and lab computers may have a version of Symantec Endpoint Protection installed on the computer. If you believe that you have a virus, and you have Symantec Endpoint Protection, you will need to run it. To do this, you will need to:

1. Open the program. Normally it should be located on the bottom right of your screen. Double click the icon, and the window will pop up. If your icon does not look like this, please contact the Help Desk.

2. When the window pops up, you first need to make sure that the "Scan for threats" tab is selected on the left side of the window. This will bring up a list of options about how you want to scan the computer. An "Active Scan" will do a quick scan of common locations that are more vulnerable to viruses.   The "Full Scan" takes longer, but it checks your entire computer. Tell it to run a "Full Scan" whenever possible.
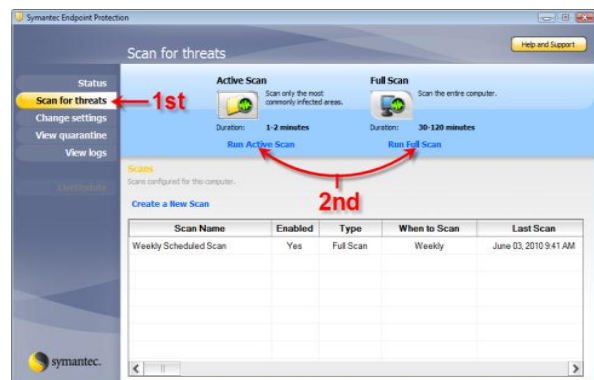
3. Once you begin the scan, you will see a window like this appear on the screen. The upper portion tells you what part of the computer it is currently scanning. The portion that I have highlighted in green is where any viruses or security threats will appear. The bottom has buttons that allow you to either pause or cancel the scan.
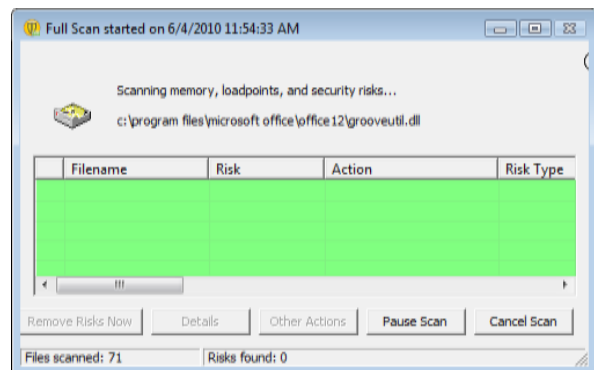
    Once you have completed the scan, you will need to check if anything was found on the system.

4. If your computer found a virus, you will want to select the bottom left option; "Remove Risks Now". Then it is recommended that you restart your computer and then run another full scan. If Symantec Endpoint Protection finds another virus, please contact the helpdesk at ext. 5678 for assistance.

Microsoft Office: Outlook

Microsoft Office is a collection of programs that are used here on campus. Some of the most common are Microsoft Word, Microsoft Excel, Microsoft Power Point, Microsoft Access, and Microsoft Outlook. Each program has a particular focus, but the only program that every Faculty and Staff member will have to become familiar with is Microsoft Outlook.

Navigating Outlook:

The easiest way to navigate Outlook is through the Navigation bar on the left side of the Outlook window. Here are the major things to know about the tab when you have the "Mail" tab selected.

Favorite Folders – These are folders that are marked as your most important folders (by default or because you marked them as such). They are easily accessible.

Primary Folder – This is just like other PST folders that you can make except that this one cannot be removed, and it is always saved on the e-mail server. Any subfolders for this folder will be stored on the server.

Inbox – This is the default location for all received e-mails.

PST Folders – These are folders that are similar to the Primary folder except that you create these. They can be stored anywhere.

Sub Folders – These are folders that are created within PST folders for more organization.

Tabs – These tabs on the bottom select what mode you want the navigation bar to show.
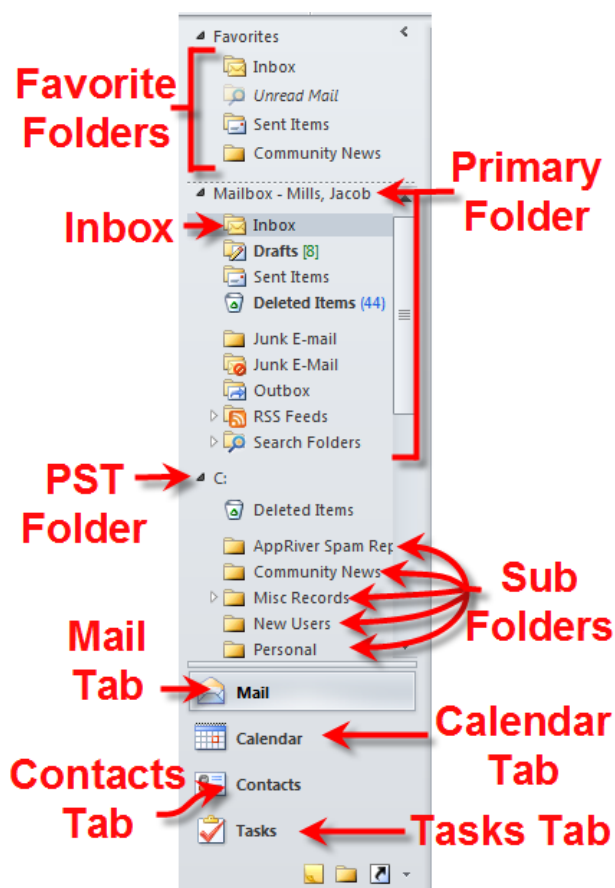
Basic Folders:

Inside outlook, there are basic folders in the Primary Folder that are very important to know. These folders are the **Inbox**, **Deleted Items**, and **Sent Items**.

The **Inbox** is the default folder for all newly received e-mails. By default, all E-Mails will stay in this folder unless you move them somewhere else (either by moving them to a different folder or by deleting them).

The **Deleted Items** is a folder that stores every e-mail that you have deleted until you empty it. It is identical to the Recycle Bin for Windows (see Basic Computer Info). If you happen to accidentally delete an e-mail that you wanted to keep, you can go to the **Deleted Items** folder and find it. Keep in mind that all of your deleted e-mails will still take up space. It is a good practice to clear out your Deleted Items folder at least once a month. To clear the entire folder, right click the **Deleted Items** folder and select **Empty "Deleted Items" Folder**. If you only want to fully delete some e-mails, you can delete them individually from inside that folder.

The **Sent Items** folder keeps track of all of the E-Mails that you send out. If you are not sure of what you said in an E-Mail or if you cannot remember if you even sent an E-Mail to a particular person, you can always check your **Sent Items** folder.
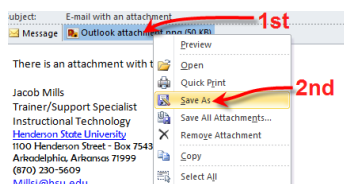
E-Mails:

When you are inside your selected folder, there will be a window directly next to the Navigation Bar that actually displays what is inside the folder. Outlook has different icons that help you know what status your E-Mails are under.

- ✉ Unread E-Mail. This is an E-Mail that you have not checked yet.
- 📭 Read E-Mail. This is an E-mail that you have already checked at some point. To read an E-Mail, you need to double click it. This will open a new window with the E-Mail.
- 📩 Replied E-Mail. This is an E-Mail that you have sent a reply to. To send a reply, you will select the "Reply" option at the top left of the E-Mail window.
- 📤 Forwarded E-Mail. This is an E-Mail that you have forwarded to someone. To forward an E-Mail, you will select the "Forward" option on the top left of the E-Mail window.

To open an E-Mail, you need to double click on the message. This will open a new window that will display your E-Mail. If the e-mail has an attachment, it can be found directly above the E-Mail message.

To open it, you will double click the attachment. This will open it in a new window. To save the attachment, right click the attachment, and then select "Save As". Now select where you would like to save the attachment.


To delete an E-Mail, you will need to follow these steps:
1. Select the message/s that you want to delete
2. Then you can either:
   a. Select **Edit** and then **Delete**
   b. Press **Delete** on the keyboard
   c. Select the black "X" with the word "delete" underneath it (shown to the right). It is found near the top left of the Outlook window.

To add attachments to an E-Mail, you will need to follow these steps:

1. Select the **Insert** tab at the top of the E-Mail window

2. Select **Attach File** or **Attach Item** depending on which you need. (Attaching an item allows you to attach a voice message, E-Mail, calendar, or other Outlook item. Attaching a file allows you to attach anything stored on your computer as long as it is not too large of a file.)
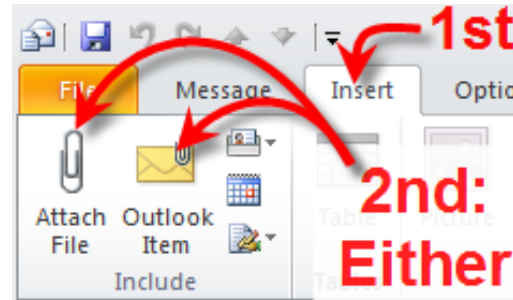
Find the file and select it. If you are adding a file, select **Insert**. If you are adding an item, select **OK**.

Now if you look under the subject and above the E-Mail message, you should see the attachment. If you do not, try the process again. If you still do not see it, please contact the HelpDesk at (870)230-5678.

Global Address list:

The Global Address List contains the E-Mail addresses for all Henderson State University employees, as well as distribution lists that sends messages to ALL FACULTY or ALL STAFF or to individual department. To access this list, you need to:

1. Select "TO" which is found to the left of the bar that you insert the destination E-Mail address.

2. Find and then select the individual/s that you want to send it to by double clicking the name, or by selecting the name and the pressing **To ->** near the bottom. To find individuals faster, there is a search bar at the top. If you type the name (last name) of the person, it will automatically bring you to that part of the list.

3. Once you have found everyone that you want to send it to, select **OK** at the bottom.
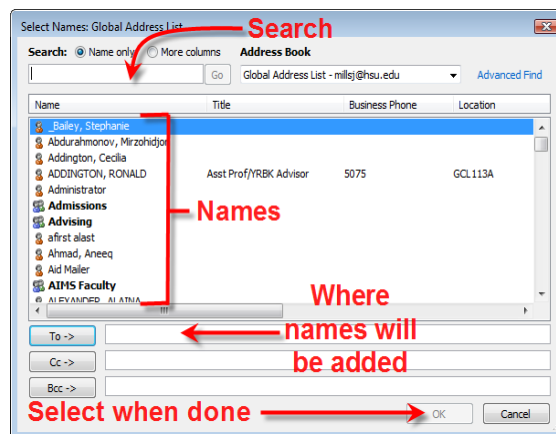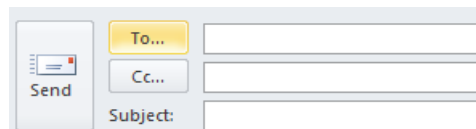
PST Folders:

PST folders are the primary folders for Outlook. Each one of these folders creates a new file whatever the destination location is (the C drive, the X drive, the E-Mail server, etc…). You do not want to make a lot of these because it strains the system if you have too many. You should have at least some, however, because there is a limit to how much space you can use on the server. I would strongly recommend starting out with only two. Make one for your C drive, and one for your X drive. If those fill up (there is a size limit, but it is large enough that you will not have to worry about it for a while), then you can create another PST folder at that time.

There are advantages and disadvantages to each location, so you will want to think about where your E-Mails should be stored. Here are the factors to keep in mind:

Benefits:

- C Drive:
    - E-Mails can only be accessed from that computer (More Secure).
    - Accessible even if the network and internet is down.
    - Excellent for storing old E-Mails that you are only keeping as records.
    - More space available in case you need to make more PST folders.
- X Drive:
    - Accessible from any computer that you log into on campus.
    - There is a lot more space available than the server allows.
    - Excellent for E-Mails that may be viewed more often or are very important.
    - Even if your computer gets a virus and data is lost, the e-mails here will most likely not have been harmed.

Disadvantages:

- C Drive:
    - If you get a virus and your hard drive has to be wiped, you will lose these E-Mails.
    - You cannot access these E-Mails from any other computer.
- X Drive:
    - You cannot access these E-Mails unless you are on campus and the network is available.
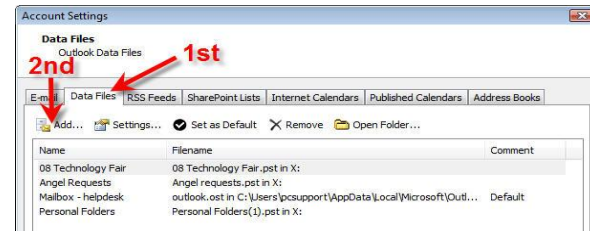
Creating PST Folders:

1. After opening Outlook, select **File** at the top.

2. Select "Account Settings"

3. A menu should appear that has three options. You will want to select the first one. That option says "Account Settings…"

4. In the new window that appears, make sure that the **Data Files** tab is selected.

5. Select **Add** to create a new folder.

6. Make sure that the second option, **Outlook data file,** is selected.

7. Select **OK**.
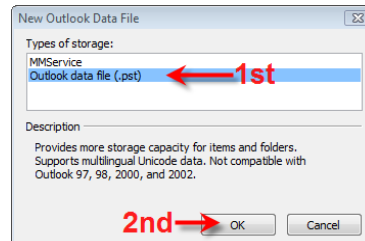
8. With the window that appears, you will need to select where to store the PST Folder. First, select **Computer on the left side of the window.**

9. Second, choose which location you would like (the C drive or the X drive)

10. Now you will need to name the PST Folder. I strongly recommend that you call it something that describes what it contains. I called my C drive PST 'C Drive'. It makes it easy to find in case it gets lost or disappears. This is also what it will be called inside Outlook.

11. Finally, select **OK** when the destination is chosen and the name is correct.
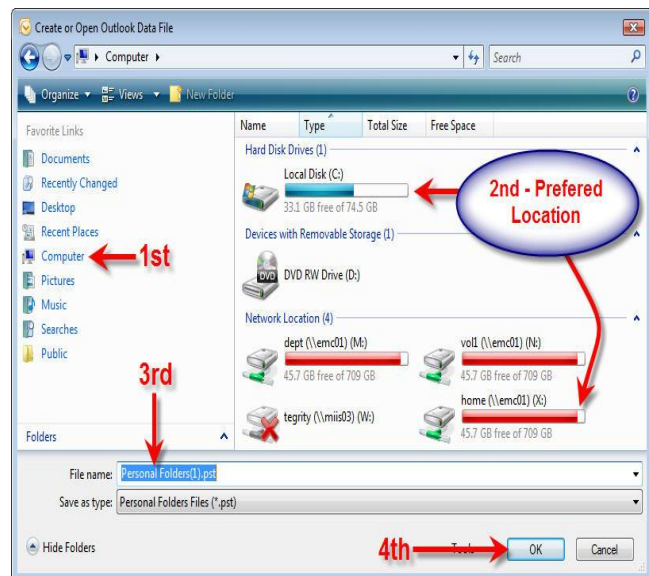
12. Now we are back to the first window. Notice that now the file has been added.

13. If you would like to create another PST Folder, please repeat the process from step five onward.

14. Once you are done creating your PST folders, select "Close".

Creating Sub-Folders:

  If you followed my example before about creating a PST folder called C Drive or X Drive, it is possible to know exactly where your PST folder is stored. Then your sub-folders that you create can make it easier to organize your e-mails. For instance, I created a sub-folder in my C Drive that stores my community news e-mails. I named that subfolder "Community News". You can make a lot of folders inside of just one PST, so do not be afraid to make numerous sub-folders if you need them.

  It is relatively easy to create sub-folders inside outlook. Here are the steps to take:

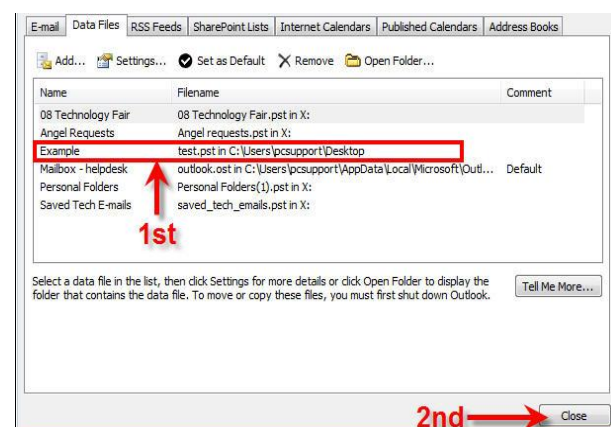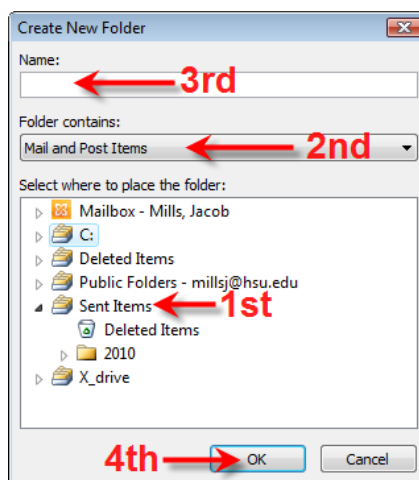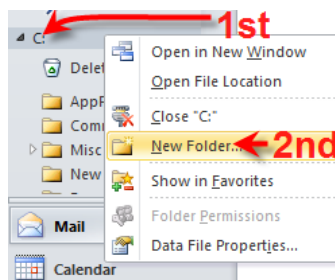1. First you will need to find the PST folder that you would like to use as your parent folder. After you have found it, right click that PST folder.
2. A menu should pop up. You will need to select **New Folder**.

3. Now a new window should appear. First, you will need to select the folder where you want your new folder to be.

4. The second thing to check is the dropdown menu. Make sure that this displays what you want it to hold. "Mail and Post Items" is the correct selection for E-Mails.

5. Third, you need to name the sub-folder. Make sure it is short, but that it describes what it is holding

6. Finally, Select "OK".

  Now the subfolder should be created. If you cannot already see it, you will first need to find the parent PST folder. Look to see if there is a small box with a black triangle or a white one to the left of the PST folder. If there is a white triangle, then you will have to click on the triangle. This will expand the folder and allow you to see all of the sub-folders within that PST folder. If you still do not see the folder, check to make sure that it is not under the wrong PST folder. If you still cannot find it, please contact the Helpdesk at (870)230-5678 for assistance.

Setting up Appriver:

  Henderson State University uses a system called Appriver with our Exchange server. Appriver oversees and manages SPAM E-Mails that are sent to your E-Mail address. When it detects SPAM E-Mails, it blocks them and puts them in a special location on their server. The Appriver system begins working for your E-Mail address as soon as your E-Mail address is created. Although it is set up from the beginning, you do not receive a report about what was blocked without taking special steps.

  If you would like to receive an E-Mailed report once per day about what was blocked, you will have to contact Harvey Grassi at (870) 230-5586 or by E-Mail at GrassiH@hsu.edu. Make sure to tell him that you would like to be registered for the Appriver spam report.

Physical Telephone System

Starting in the fall of 2010, Henderson State University has changed over to the ShoreTel phone system. This system utilizes both a telephone as well as a computer program. This makes it possible for individuals to use a phone as well as their computer for phone calls. It also allows for Outlook to be integrated with the phone system. This means that if you mark events on your calendar in outlook, then they will be able to see when you are in meetings, out of the office, etc.

With so much that can be done with it, there is a lot to set up in the beginning. Although there is a lot to do, ShoreTel has done an excellent job of making the system as user friendly as possible.

Setting up the Physical Phone:

The first time that you use your phone, you will have to go through the setup process. Once you have your phone plugged into the wall properly and it has loaded up, there are a few steps to take:

1. Press the Voice Mail function key on your phone.
2. Dial the extension number that you have been assigned.
3. Enter your voicemail password followed by # key. The default voicemail password is 1234.
4. If you had not set up your voicemail yet, you will be asked to change your password. Enter at least four numbers and then press #. Make sure to remember this password. Then reenter your password and press # when prompted to do so.
5. Now you will be asked to record your name. Once you have done this, press #. The key options that you have at this point are:

# – Accept	3 – Delete
1 – Review	* – Cancel
2 – Re-record	

There are numerous special features that are available on the phone, but now that you have set up the phone, it is available for use just like a normal phone.

Headsets, Speaker Phone, and Muting:

It is possible to place calls using the handset, a headset, or the speaker phone. By default, it is set so that you use the handset. If you would like to use the Headset or the speaker phone, please press the corresponding button either before the call or when you would like to switch to that mode. These buttons can be found between the handset and the number pad.

- The headphones button has a picture of some headphones next to the button. The button will glow green if the option is selected.
- The speaker phone button has a picture of a speaker next to the button. The button will glow green if the option is selected.
- Between those buttons is the mute button. If you wish to just mute the sound from your end without putting whomever you are speaking to on hold, you will use this button. It is perfect if you have a student stop by your room while you are on the phone. You can mute your sound and talk to the student quickly without the person on the other end of the phone even noticing.

Sending Calls:

Call instructions:

Local or 1-800:
• 9 + local # or 9 + 1-800 #

Long Distance:
• 9 + 1 + area code + number   When prompted type in the long distance code

Collect:
• 9 + 0 + Phone Number (tone) wait for operator

Campus Locations:
• Four-digit campus extension

Campus Operator:
• 5000

Receiving Calls:

If the information for the incoming call is available, it will be displayed on the LED screen. To answer the call, you need to either pick up the handset, or select the option that you would like to use (headset or speaker phone). To hang up at the end of the call, either press the button again, or place the handset back on the receiver (depending on which you used).

It is also possible to divert calls. There are two easy ways that you can divert a call before you have answered it. The first is to have it sent to voicemail. When the call comes in, there will be some options on the bottom of the LED screen. One of them will say "To VM". Pressing that button will send the phone call directly to your voice mail. The second method will redirect the call to another individual. To do this, select the **Transfer** button on your phone and then enter the number. Once that is done, press the button under the LED screen that says **Transf**.

If you wish to answer the incoming call and put the current call on hold, you can select one of the "Call Appearance Buttons" (one of the circular buttons found on the top right of the ShoreTel 230 and ShoreTel 265 phones). If you are out of these buttons, or if you do not have any on your phone, you can press the **Hold** button. If you used the Call Appearance Buttons, then you can go back and forth between the calls by selecting the corresponding button. If you do not have these buttons, or there are more calls than you have buttons, then the **Hold** key will cycle through any callers that you have on hold.

Transferring a Call:

It is possible to transfer calls on campus. There are two different methods to use when transferring a call. The first is a Blind Transfer. This is where you send the caller directly to the destination phone without talking to anyone at that destination first. Here are the necessary steps:

1. Press the **Transfer** button. (This puts the call on hold)
2. Dial the number for the transfer.
3. Hang up the phone.

The second type of transfer is a consultative transfer. This method first places the caller on hold and then allows you to contact the destination phone. You are able to talk to this individual before you make the transfer. This allows you to ask if the individual is available to receive the call or to give a summary of a situation before you transfer the call. Here are the steps to do this:

1. Press the **Transfer** button. (This puts the call on hold)
2. Dial the number for the transfer.
3. Press the button directly underneath the "Conslt" option on the LCD screen.
4. Speak to the person you are transferring to.
5. Press the button under the "Yes" option on the LCD screen if you will continue the transfer.

Adjusting volumes:

Like most all phones, it is possible to adjust the volumes for the ringer as well as the modular used to communicate (Handset, Headset, and the Speaker phone).

- Ringer
  - While the phone is not being used, use the Volume Control Buttons. The Volume Control Buttons are recognizable because there is a picture of a triangle directly next to an arrow pointing up and an arrow pointing down. Press the top arrow to increase the volume, and press the bottom arrow to decrease the volume.
- Handset
  - While the handset is picked up, use the Volume Control Buttons. Press the top arrow to increase the volume, and press the bottom arrow to decrease the volume.
- Headset
  - Press the headset button if it is not already selected, and then use the Volume Control Buttons. Press the top arrow to increase the volume, and press the bottom arrow to decrease the volume.
- Speaker phone
  - Press the Speaker phone button if it is not already selected, and then use the Volume Control Buttons. Press the top arrow to increase the volume, and press the bottom arrow to decrease the volume.

Using the Directory:

The phone should find the Henderson State University directory without a problem as long as you have the ShoreTel 230, 265, or similar models. and you have also set up your Call Manager to integrate with Outlook (See Integrating the Call Manager with Outlook). To use the directory, follow these instructions:

1. Press the button labeled **Directory**.
2. A new window on the LCD screen should appear. Using the alpha/numeric keys, type in the first few letters of the last name for the individual that you attempting to contact. Use "**#**" for spaces and "*****" to represent any character.
3. As you press the keys, it should narrow down the contacts list. Then use the up and down directional keys found next to the LCD screen to cycle through the contacts.
4. Once the individual is listed on the screen, select the corresponding button on the right side (if it is the top, middle, or bottom name).

Tutorial link:

If you have any questions, the webpage http://support.shoretel.com/training/shoretel_9/ has a lot of informative lessons. I recommend that you try out these lessons to see if they might help: Unit 1 and then the tutorial for your type of phone (most should have the ShoreTel IP 230 Phone).

Computer Telephone System

Setting up:

The program that is used on the computer is the ShoreWare Call Manager. This program continually runs in the background of your computer, or it can be docked on one of the sides of your computer. Here is a screen shot of what the Call Manager looks like.
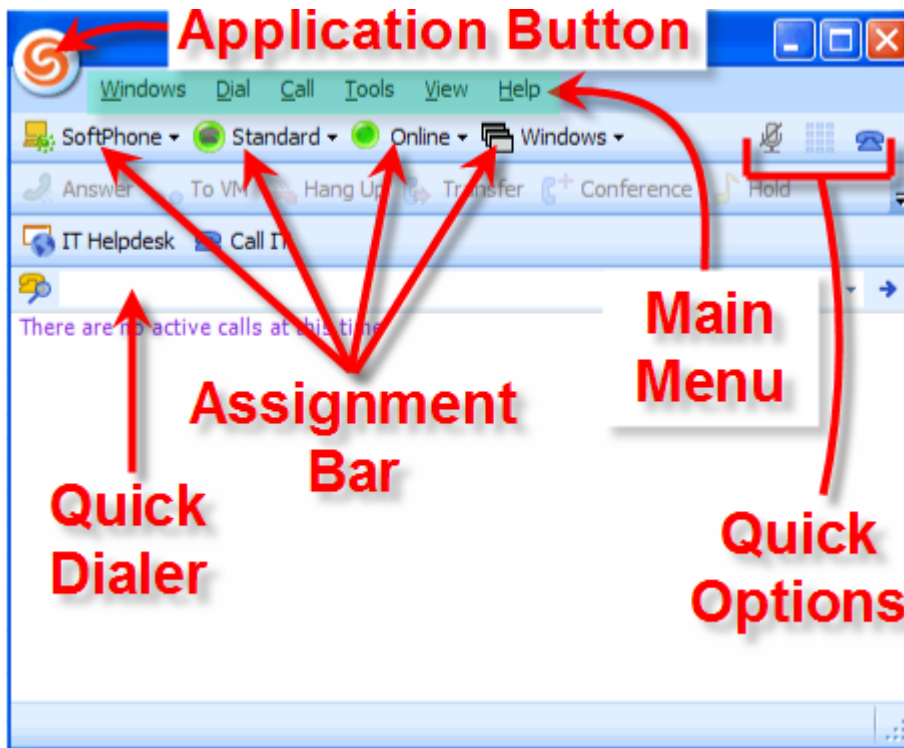
- Application button – This button has a drop down menu of common tasks. It is very similar to the application button for Microsoft Office programs.
- Main Menu – Highlighted in green is the set of menu options that allow you a full range of control over the program.

- Quick Options – These are some quick options that you may need during a call.
  - The option on the left side is the microphone. By selecting this option, it is possible to mute or un-mute your microphone during a call.
  - The middle icon is the keypad option. When you are in a call, you can select this to bring up a keypad. This is helpful if you need to select numbers during a call.
  - The option on the right shows the status of your phone line.
    - - The line is not being used.
    - - The line is being used.
    - - The line is not being used, but you have some missed calls.
- Assignment Bar – These are the options that you currently have your phone set to.
  - On the left where it says "SoftPhone", this is where you select how you want your phone set.
  - To the right, it says "Standard". This is where you will change your status. Everyone on the network will be able to see your status through the Call Manager. If used properly, this allows you to select "Out of Office" (or a similar option) as a choice, and then everyone will know that you are not in the office to accept any calls.
  - To the right of that is your IM status (Similar to the previous options).
  - The fourth option says "Windows". This gives you a selection of different windows that you can view. Some windows include your voicemail, a call history, the directory, and more.
- Quick Dialer – This is the Bar that is used if you want to quickly call someone. If you type in a name here, it will search through the directory and attempt to find the number. This will allow you to easily and quickly make phone calls to anyone on campus.

Making a Call:

Internal Call:

The easiest way to make a call through the Call Manager is to type the name or the extension of whomever you want to call. Once you have done so, a list of possible contacts will appear in the white space below the Quick Dialer bar. Find the individual that you would like to contact, and then left click on the name to begin the call.

External Call:

The easiest way to make an external call using the Call Manager is to type in the number in the Quick Dialer bar. Here are the guidelines when making an External Call:

Call instructions:

Local or 1-800:
  • 9 + local # or 9 + 1-800 #
Long Distance:
  • 9 + 1 + area code + number   When prompted type in the long distance code
Collect:
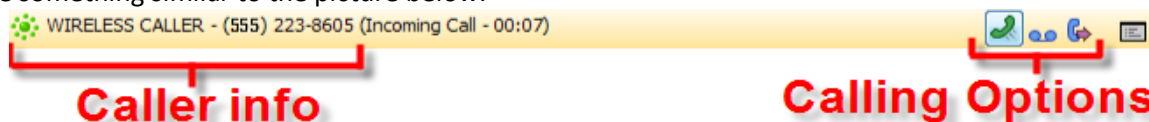 • 9 + 0 + Phone Number (tone) wait for operator
Campus Locations:
  • Four-digit campus extension
Campus Operator:
  • 5000

Receiving a Call:

When you receive a call, your computer should play a ringing sound through your speakers or headphones. By default, it will display the call in the white portion below the Quick Dialer. It will look like something similar to the picture below.

- Caller Info – This is where the caller's name and phone number will be listed if the information is available.
- Calling Options – This is where your options can be found before or during a call.
  - ☎ - This is the option that you select if you want to answer the call.
  - ☎ - This is the option that you select if you want to send the call directly to the Voice Mail. If you select this when you receive a call, it will send it to your voicemail. If you select this when you are transferring a call, it will send it to that individual's Voice Mail.
  - ☎ - This is the option that you select if you want to transfer the call before answering it.
  - ☎ - This icon will appear during your phone call. When you are done with the call, select the icon to hang up.
  - ♫ - This icon will appear during your phone call. This option will put the call on hold.
  - ☎⁺ - This icon will appear during your phone call. This option will allow you to create a conference call.

Transferring Calls:

1. If you would like to transfer a call, you will want to first select the **Transfer Call** icon found above.

2. A new window should appear that looks similar to the window on the right. At the top, put in the name or number of the person in which you want to transfer the call.

3. After that, the buttons on the bottom will light up. You will need to select whichever type of transfer you would like to make. The primary options are: **Transfer**, **Consult**, and **To Mailbox**.
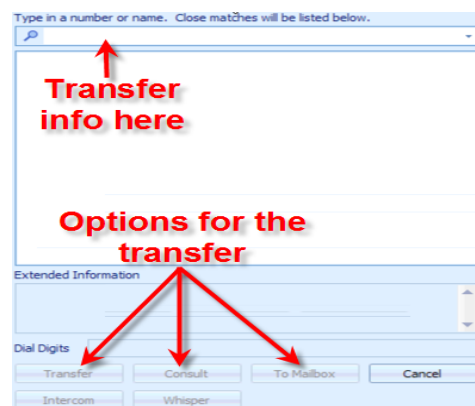
- Transfer – This will do a blind transfer. The caller will be sent directly to whomever you transfer to.
- Consult – This will do a consultative transfer. This is used if, before sending the call, you want to talk to whomever you are transferring the call. After selecting this, there will be an option underneath the caller info that asks if you want to transfer the call. It will have two options: **Transfer**, and **No Thanks**. Select whichever is necessary.
- To Mailbox – This option will send the caller directly to the voicemail of the person that you are transferring the call to.

Voice Mail:

   To access your voicemail, you will select the "Windows" option on the "Assignment Bar" and then select "Voice Mail". This will now display the Voice Mail options near the bottom of the manager. There should be three categories to hold voice messages. Those are "Inbox", "Saved", and "Deleted".

- Inbox – This is where all new Voice Mail messages will be stored.
- Saved – This is where any saved messages will be stored.
- Deleted – This is where all deleted messages will be stored. Keep in mind that any deleted messages will be permanently deleted at 2am every day (as long as the message is at least six hours old).

   To check each category, you will need to make sure that the box next to the category should be a maximized box (looks like this: ▭). If not, then it should be a minimized box (it looks like: ⊞). To change between one mode and the other, you only need to click on the box.

   If you see a voice message that you would like to check, you will need to double click on the message. This will have the message play on the computer. If the message is in bold type, it has not been heard, but if it is not in bold, then it has been listened to at some point. If you would like to have more options, you can right click the message. Some examples of these options include moving the voice message, marking it as unheard, exporting the voice message as an audio file, etc.

Integrating the Call Manager with Outlook:

   It is possible to link your Outlook Contacts and your Calendar with the Call manager. This allows for you to have outlook automatically change your status when you have an appointment. To set this up in Call Manager:

1. Click the Application button.

2. Select the **Options…**

3. In the new window (shown to the right), select **Outlook** on the left column.

4. Look to see if Voice Mail and Calendar options are installed. If they are not installed, select **Install**. If you installed them, you will have to restart after this and return to this window.

5. Make sure that all of these options are selected if you want calendar integration, a linked directory, and voicemails sent to your E-Mail.
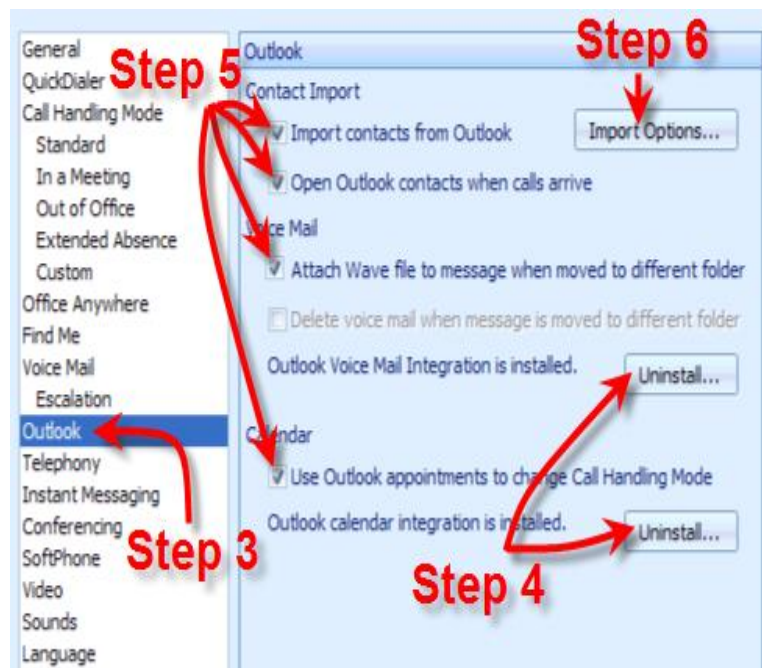
6. Select the **Import Options**.

7. A new window should appear. On the first tab, make sure that there is a check next to "Enable disk caching". Then make sure that the update is set for whatever suits you best. If you restart your computer a lot, select "on Startup". If not, select the second option and set it for your lunch period or at the end of the day.

8. When you have set that up, select **OK** on the bottom.
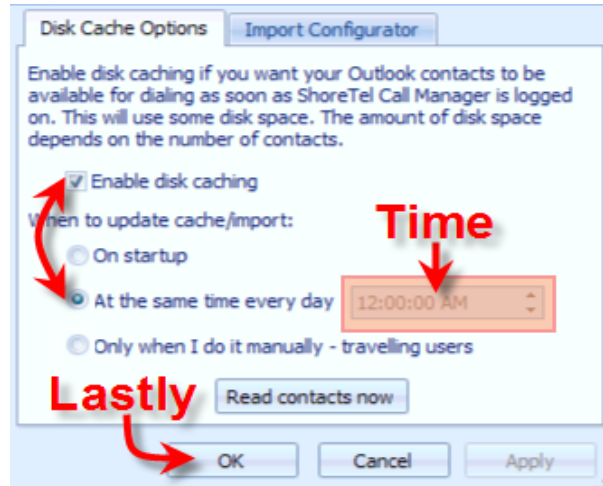
Tutorial link:

If you have any questions, the webpage http://training.shoretel.com/shoretel_10/mainmenu.htm has a lot of informative lessons. I recommend that you try out these lessons to see if they might help: Unit 1, Unit 2 (sections 2 and 3), Unit 4, Unit 5, Unit 6, and Unit 9.

HSU Webpage

Finding the HSU Webpage and Making it Your Homepage:

The HSU webpage can be found at www.hsu.edu. You can either select the link provided (if this is an electronic copy), or you can open your browser and type in that address in the address bar.

If you wish to easily add this as your homepage with internet explorer, then you will first have to select **Tools** and then select **Internet Options**. This should bring up another window.

This window should open up in the **General** tab. Directly below the tabs is where your current home page is listed. There are options below that window that allow you to change it. If you select **Use Current**, then it will use your current Webpage as the Homepage.

Select **OK** when you are done.
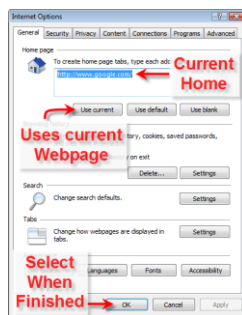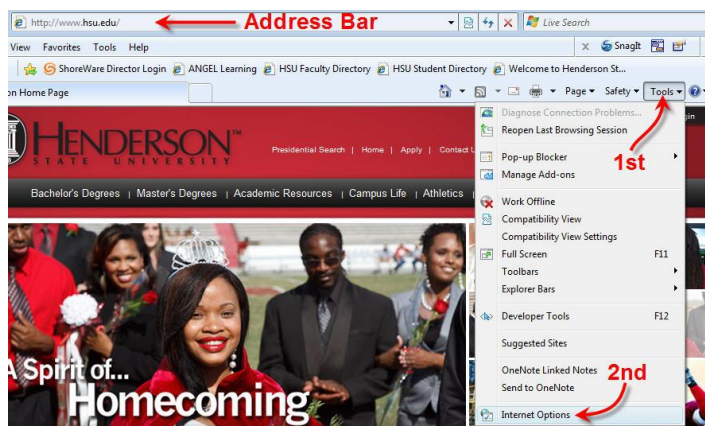
Every browser will have its own method for changing your homepage. Even though they may be different, there will be certain similarities. For instance, to add this as your homepage in Firefox, you will first have to select **Tools** and then select **Internet Options**. This should bring up another window.

This window should open up in the **General** tab. Directly below the tabs is where your current home page is listed. There are options below that bar that allow you to change your homepage. Select **Use Current Page** to use the current Webpage as the Homepage.

Select **OK** when you are done.
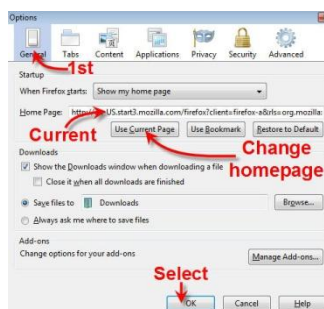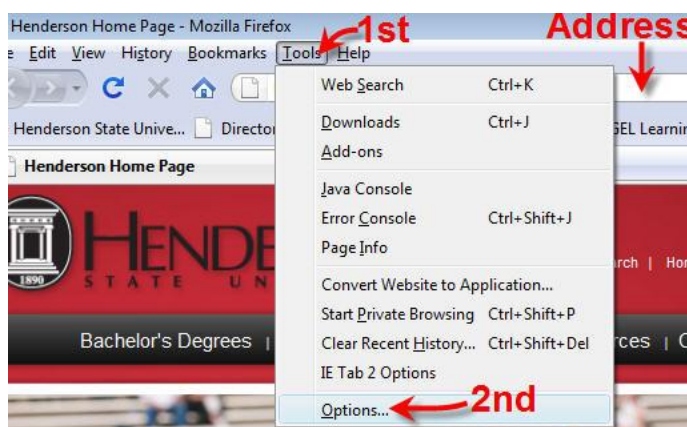
Navigating the Webpage:

- Common Tabs – These tabs will be at the top of every page on Henderson's website. These links will help take you to the desired sections
- Angel and myHenderson – These links will take you to either Angel (the Online-Learning system that we use) or myHenderson (our intranet system).
- Search/Index – These sections will allow you to find your desired pages. The Index will have a list of all the sections/departments that have webpages. The search bar will allow you to search for the information or pages that you would like to find.
- Links of Interest – These links will take you to information that specific individuals may want to find using the homepage.
- Prospective Student – These are links that prospective students may be interested in.
- Social Networking – This section that is covered in Green is where you can view YouTube videos, Facebook events, and twitter posts for Henderson State University.
- HSU Events – This section displays the upcoming calendar events and the most recent news events that are viewable.
- Campus Map – This is where you can find a campus map.
- Directories – This is where you can pull up the directory for a faculty/staff member, or any of the students.

myHenderson

Introduction to myHenderson:

   MyHenderson is best described as a resource site for all of Henderson (students, faculty, and staff). It is a site where you can go to check your E-Mail, chat with other members of the HSU community, view course information, plus much more!

   MyHenderson can be found by either going to the www.HSU.edu page and selecting the Reddie Connect link on the bottom right, or you can type in reddie.hsu.edu.

Logging in:

   On the MyHenderson login screen, there is a place for you to put in your User Name and Password at the top left of the window (see the picture below). By default, the password should be the first four letters of your last name followed by the last four digits of your Social Security number. If you have forgotten your password, type in your username and then select the "I forgot my password" button.
   If you are a GA, or you were a student before you became a faculty or staff member, then your password may be the First four digits of your birth date followed by the last four digits of your Social Security number.

After you have logged in properly, you should see your name where the User Name and Password boxes used to be.

Welcome back **JACOB A MILLS** (*Personal Info* | *Logout*)

If you wish to change your password, you can do so by:

1. Select "Personal Info" next to your name at the top
2. Now select the "Password" tab
3. Put in your old Password and then put in your new password two times. Make sure to choose something that you will remember.
4. Select "Save"

Resources (Employee) tab:

   This tab contains pages for technology resources, institutional information, business and finance information, employment and benefit information, and links to services and help. A copy of this manual, as well as many other helpful files, can be found on this tab. There are different pages that are accessible under the Resources (Employee) tab. To access these, you need to select the proper page on the left side of the screen. A screen shot of the links to the proper pages are displayed in the screen shot to the right.

- Resources for Faculty and Staff – Default location when you select the Resources (Employee) tab. This page contains policies and handbooks.
- Benefit Information – Displays info such as tax deductions, Annual leave/sick leave built up, paystub viewer, W2, etc…
- Business-Finance Info – HSU Budget, Requisition Entry, Item approvals, and other info (such as travel reimbursement).
- Discount Offers – Lists official and unofficial discounts offered to Henderson Employees.
- Henderson Tools – Place for Employees to post/view info such as newsletters, memos, etc.
- Services and Help – Info about how to line up services/help
- Staff Senate – This is where you can quickly and easily see the staff senate minutes and the members of the Staff Senate.
- Technology Resources – This is where you will find info about common tech or program actions that you may need to perform.
- Webmasters Resources – Information about the webpage for web editors.

Courses I Take Tab and Courses I Teach Tab:

This tab is the most important for both teachers and students. If you are taking classes, you will see a "Courses I Take Tab". If you are teaching, you will see a "Teaching - Courses I Teach Tab". If you are doing both, you will see both tabs. These tabs hold a special section that contains very important links. These links are found on the bottom right of the webpage, and most of these links will open in another window, so make sure that the pop-up blocker does not block the window (see the screenshots of the dropdown option under Angel: Required Programs). The teaching tab's section is called "Faculty Resource Links", and the student's section is called "Campus Connect Student Links."

The student tab holds links that can display things ranging from Adding/Dropping courses to viewing your Financial Aid. This is also where students go to check their grades at the end of the semester.

The Faculty tab holds important links that display various important topics. Some of these include the courses that they are teaching, an advising section for adding and dropping students into different courses, a pictorial roster, etc. There are also added sections on the left side of the page. This is similar to the Resources (Employee) tab except that these pages contain handouts and information for individual "Colleges" on campus.

Academics:

This tab holds a lot of important information that is accessible even before you log in. For instance, you are able to find the calendar for the semester as well as any generic information that you might need to find or direct students to.

Emergency Preparedness:

This tab is where you fill out your information so that you can receive Rave Alerts. These are important messages for the campus. The topics range from bad weather warnings, emergency warnings, to school cancelations. This tab also has the emergency plans for the campus listed.

Using Web E-Mail:

When you are at the MyHenderson Screen, select "Faculty/Staff Web E-Mail" under the "Quick Links" portion on the left side of the screen. This will bring up a new window prompting you to log in. To log in:
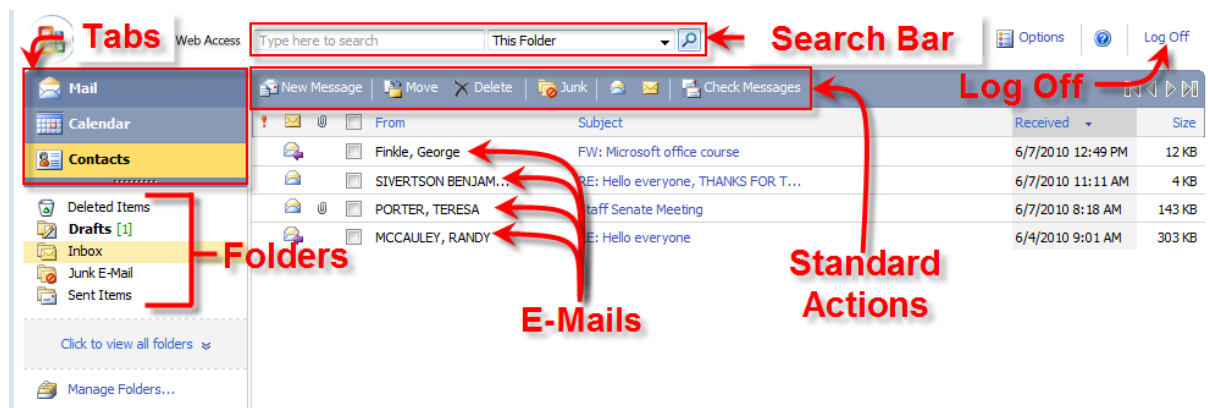
First make sure that you are set for a public or shared computer. This will help keep your information a little more secure because it will not attempt to remember anything about this location.

Second, put in your User Name and Password. It will be the same information that you use to log into your HSU computer. You MUST put hsdomain\ before your user name. The slash also must go the proper direction.

Third, you will select "Log On". If you have put in everything correctly, it should bring you to a new screen.

Navigating the Web E-Mail:

- Tabs – These tabs are similar to the tabs in Outlook. There are the "Mail", "Calendar", and "Contacts" tabs.
- Folders – These are similar to the folders in Outlook. You are only able to view the folders that are on the E-Mail server (so you cannot view E-Mails that are on the C drive or X drive).
- E-Mails – These are the E-Mails that are in the folder that is selected. To view them, click on the "Subject" of the E-Mail (the blue words). If you wish to select an E-Mail (so it can be moved or deleted), you must put a check in the box that is next to the name of the sender.
- Standard Actions – This is similar to the Standard bar in Outlook. The primary difference is that there are fewer options here.

- new message - allows you to create a new message
- Move – allows you to move an E-Mail into a folder that you can see (the E-Mail must have a check in its box)
- Delete – Allows you to delete an E-Mail (the E-Mail must have a check in its box)
- Junk – Labels that E-Mail as Junk and moves it to the Junk E-Mail folder
- Mark as read – This will mark the E-Mail as read even if you haven't read it (the E-Mail must have a check in its box)
- Mark as unread – This will mark the E-Mail as unread eve if you have read it (the E-Mail must have a check in its box)
- Check Messages – Refreshes your Inbox
  - Search Bar – This is used if you have a lot of E-Mails and you know what you are looking for. This bar is also used if you try to use the Global Address Book (used the same was as it is in Outlook. It just looks slightly different)
  - Log Off – This button is used to log off when you are done using the web e-mail. For security reasons, please log off every time you are done or leave the computer unattended

Logging out:

When you are ready to leave MyHenderson, make sure to select the "Logout" button. This is located next to your name at the top. You will know that you are logged off when your name disappears and it wants you to log in again.

Angel

Angel is the site that HSU uses for all online and partially online courses. Every student who is enrolled in a class that is at least partially online will be activated on the first day of classes. The login information for a student should be the same as logging onto any computer on campus. The website can be found by going to http://angel.hsu.edu.

Required Programs:

To properly run Angel, there are some programs that are very important to have. To make this easier, there is a list of all the programs necessary before you even log in. They can be found directly underneath the login bars. Here is how to check that you have what you need:

First of all, you will need to look at type of browser and what version you are using. For this example, it is Internet Explorer: Version 8. You must have at least Version 7 of Internet Explorer to run Angel properly. You also must have at least Windows XP or Mac OS/X.

Secondly, you need to check the programs listed below that. I have highlighted them in a light red color. You need to have a green checkmark by each program. If there is a red X, then it is not running properly. I will address how to fix this momentarily.

System Check

Explorer —Version
Version: 8 Platform: Windows
Resolution: 1024x768 (32 bit color)

Requirements Plugins
✓ Ajax   ✓ Acrobat Reader 7
✓ Cookies   ✓ Flash Player 10
✓ Java   ✗ Quicktime Player
✓ Javascript ✗ Windows Media
✗ Popups

Here is an example with a different browser. For this example, we are using Firefox: Version 3.5. You must have at least version 3.0 of Firefox to properly run Angel. These are the only 2 fully accepted browsers at the moment. Please use one or the other.

Secondly, you need to check the programs listed below that. I have highlighted them in a light red color. You need to have a green checkmark by each program. If there is a red X, then it is not running properly. You will either have to activate or install any program that is not working properly.
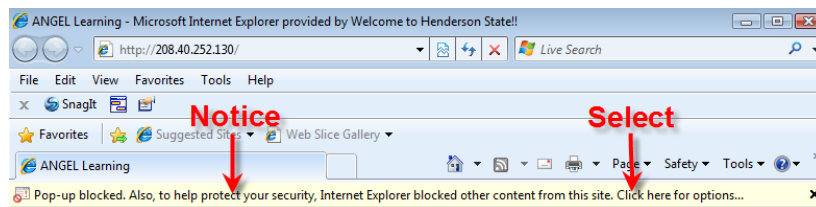
 If you notice a drop down bar like this, then you will need to read what it says. Most of the time when a program is not running properly, it is already on your computer or set up properly. It just needs to be given permission to run on this site. To do this in Internet Explorer, select the drop down menu and then select "Allow for this site" (See the picture on the bottom of the previous page). This will allow it to work properly for Angel.
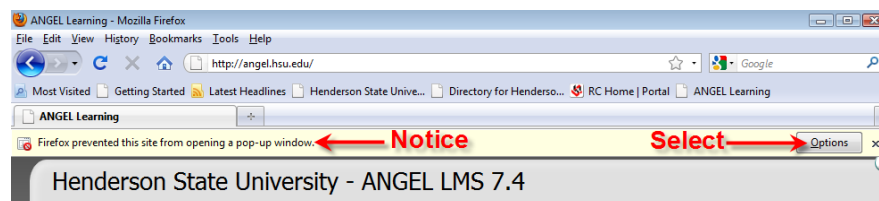
The same thing can happen in Firefox. You may receive drop down menus that ask for your permission. With Firefox, however you cannot just click the dropdown menu. You will have to select the "Options" button and tell it to "allow for the site" (see the picture shown above). This should allow the sections to work properly.

If that does not fix the issue, then you will have to either install the proper programs, or you will have to install the proper add-ons. Sometimes you will have to do both. Many of the programs can be found on the right side of the Angel page. If you have any questions or desire assistance, please contact the HelpDesk at (870)230-5678.

When you have successfully completed the setup process, all of the programs will have a check by them. This means that you are finally ready to properly run Angel.

Poise: Skylite

Skylite is the program that we use at Henderson to access the POISE server. This is where Faculty and Staff have access to important information as well as many important actions. For Advisors, this is a program that allows you to review the information about your advisees as well as sign them up for classes. For Staff, this program allows you to enter a DPS or work orders. These are only a few of the uses.

Logging In:

The first time that you log in, your User Name should be FAC_ then the first six letters of your last name followed by the first letter of your first name (if that name has already been taken, then you will have a slightly different username), and your Password should be the first four letters of your last name followed by the last four digits of your Social Security Number. For instance:

- Pretend that Bob Williams is a faculty member. His user name is WilliaB, and his Social Security number is 123456789.
- His information is:
    - User Name - FAC_WILLIAB
    - Password - will6789

After the first time you log in, however, it will ask you for a new password. I recommend using the same password that you use to log into the computer. If you want to keep them the same, make sure to remember your password whenever you change your password for logging into the computer. If you want to change your Skylite password, you can do so after logging in. (See "Changing your Password")

Navigating Skylite:

There are two major ways to view Skylite. There is a mode with graphics ON which allows you to also use your mouse. The other mode is with graphics turned OFF. With the graphics off, you are only able to use the keyboard. Keep in mind that Skylite is only the program that we use to see the data and the program is not very computer intensive, so neither way is faster than the other. They also display the exact same options, so neither one provides more support. In other words, choose the one that you feel most comfortable with.

Graphics:

In my opinion, this is the easiest one to work with. Since you are able to use the mouse, it makes Skylite a little easier to navigate. If you do not like to use the mouse, however, then you should strongly think about using Skylite without graphics.

With Graphics:
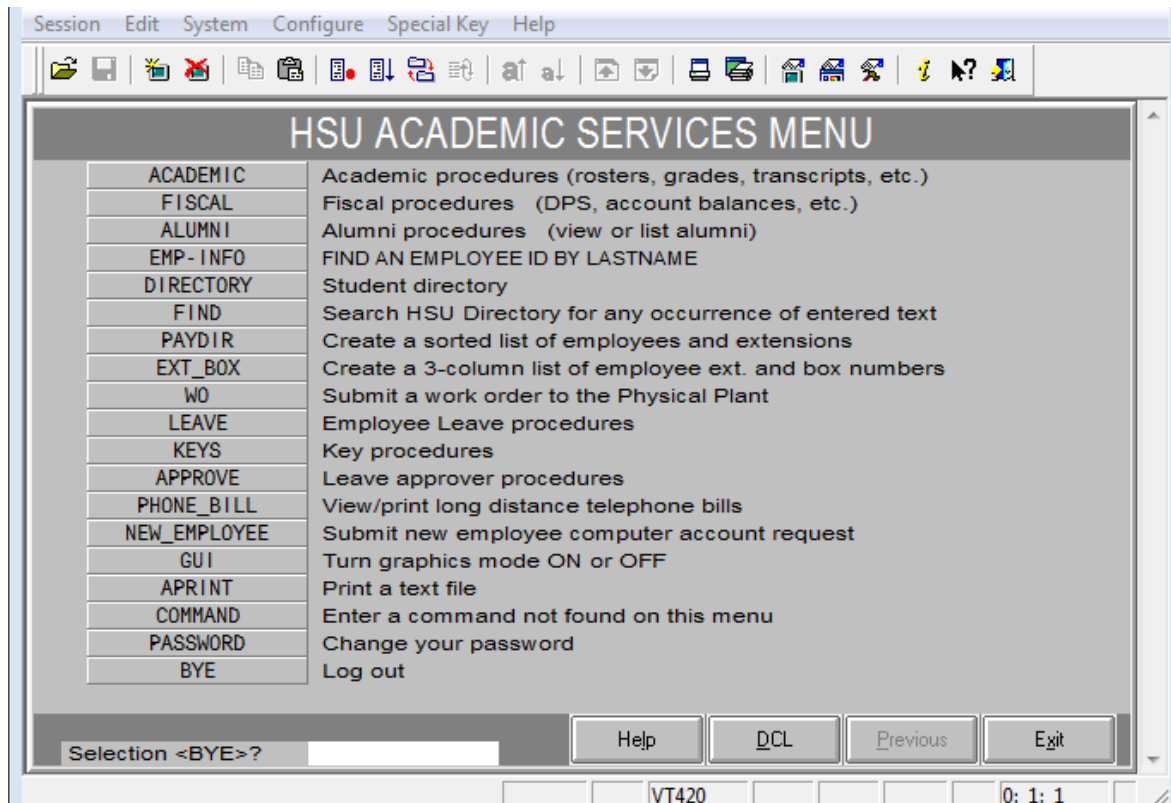
Without Graphics:

Topics:

Each selection has a good explanation next to it. Here are the primary selections that you may use regularly:
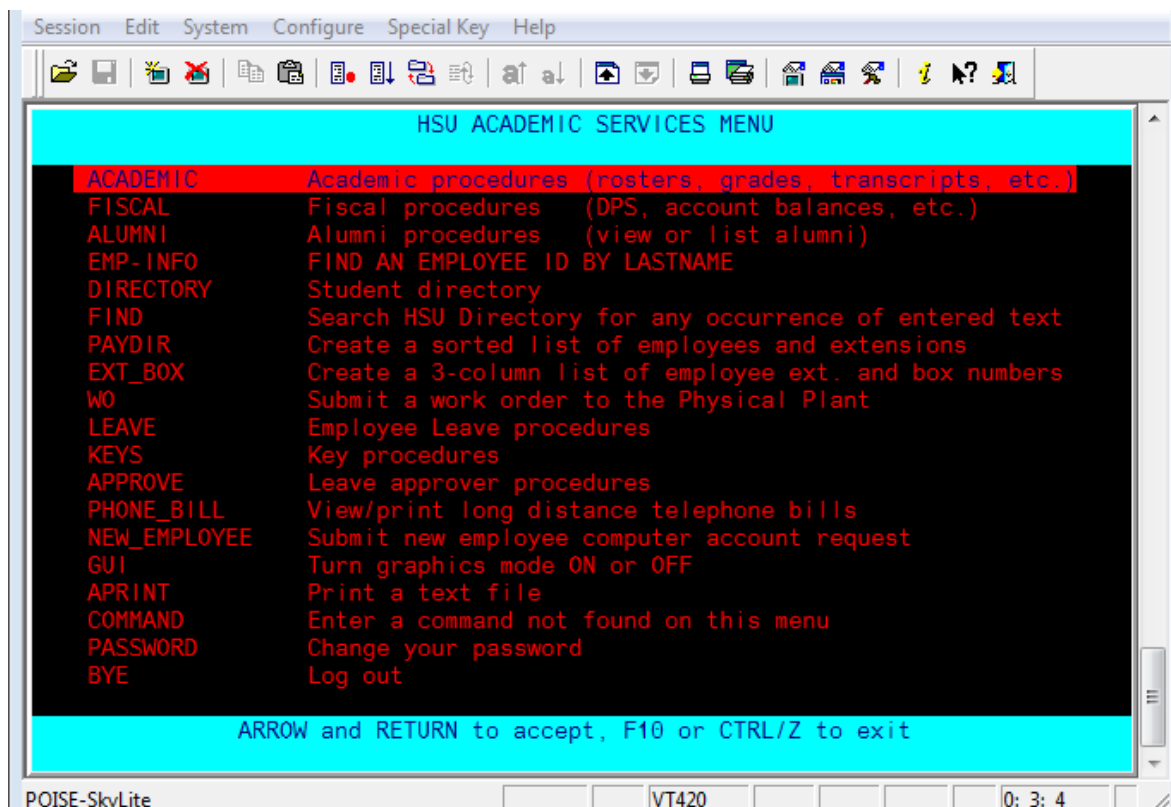
- Academic – This selection is for professors who wish to either review or change classroom/student based information
- Fiscal – This selection allows access to review balances and also access to create DPS orders (See DPS)
- WO – This is where you go if you need to create a work order
- Leave – This is where you go to review and request leave
- GUI – This switches you between graphics and non-graphics. If yours somehow gets changed, this is what you need to select to change it
- Password – This is where you change your password for Poise: Skylite. I recommend using this option whenever you change your computer login password. Keeping them the same makes it easier to remember
- Bye – This option is how you leave Skylite

Changing your Password:

If you select the "Password" selection, then it will take you to a screen that asks for your old password. After you put that in, it will ask for your new password. Then it will ask for you to verify the new password. After that, it will tell you if the password was changed or not.
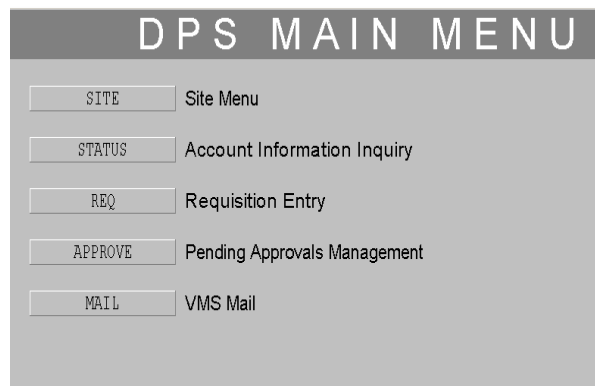
The password must be between 8 and 32 characters long. I strongly recommend using upper and lower case letters, at least one number, and a symbol like a '$'.

DPS

   DPS is the electronic system we use here on campus for issuing purchasing requisitions. Once you enter a requisition, it must first be approved by your supervisor, and then by the Purchasing Office, who will then issue a purchase order for the item(s) you requested.

Entering the DPS System:
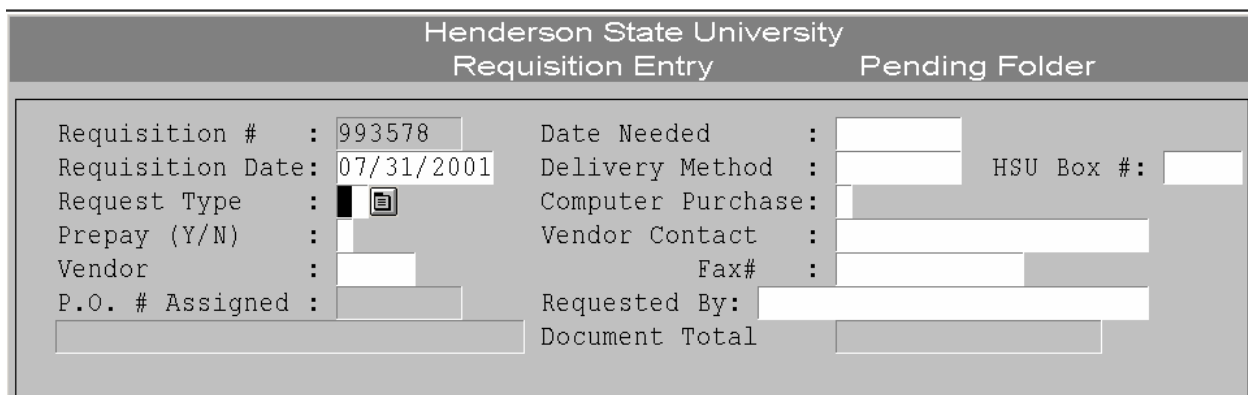
   1. At the Main Menu select the Fiscal option.
   2. Choose **DPS**.
   3. This will open up the DPS Main Menu.

Entering a Requisition:

   1. To enter a Requisition, choose the **REQ** menu from the DPS Main Menu.
   2. A requisition form will appear.
   3. Press the **F7** function key on your keyboard. This will automatically fill in a requisition number for you and the current date.

   4. On the **Request Type** field, pressing the function key **F9** will give you a list of choices. **Unless otherwise specified, you will always type RR in this field or select the RR option from the list that appears when you press F9**.
   5. On the **Prepay** field, enter a **Y** if the item has already been paid for or an **N** if it has not.

Henderson State University
Requisition Entry   Pending Folder

```
Requisition #    : 985693      Date Needed     :
Requisition Date: 08/23/2000   Delivery Method :          HSU Box #:
Request Type     : rr          Computer Purchase:
Prepay (Y/N)     : N           Vendor Contact  :
Vendor           : ▮    ▤                  Fax#   :
P.O. # Assigned  :             Requested By:
                               Document Total
```

6. On the **Vendor** field, you should enter the **5-digit Vendor ID** number.
7. If you do not know the Vendor ID number, you can type up to five letters of the Vendor's name and then press **Enter** to get a list of Vendors. If there are more vendors that meet your criteria than are displayed on the screen, you can press the **More** button to see the additional choices. To select a vendor from the list, highlight the name of the Vendor and click **OK**.

8. The Vendor's information will then appear in the lower right-hand of your screen
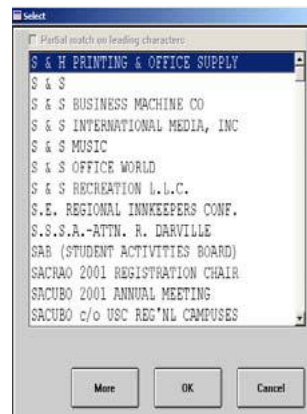

Henderson State University
Requisition Entry   Pending

```
Requisition #    : 993578      Date Needed     : ▮
Requisition Date: 07/31/2001   Delivery Method :          HSU Box #:
Request Type     : RR          Computer Purchase:
Prepay (Y/N)     : N           Vendor Contact  :
Vendor           : 42551                   Fax#   :
P.O. # Assigned  :             Requested By:
                               Document Total
```

```
S & S RECREATION L.L.C.
ATTN: JIM SPRINKLE
114 FOX VALLEY CT.
LONGWOOD              FL   32779
(407)862-1406
```

9. To enter a Dummy Vendor in the system if the Vendor does not exist, enter **80000** in the Vendor ID field. If you enter a Dummy Vendor, you need to enter the Vendor's complete information in the **notes section** of your requisition before you send the requisition!
10. The **Date Needed** and **Delivery Method** fields are both unused fields. To move through these fields, press the **Enter** key.
11. The **HSU Box #** field is a required field! Here you should enter your **HSU Box Number** or the **Box Number** of the person requesting the item.
12. On the **Computer Purchase** field, you should enter a **Y** for "yes" if this is a computer purchase or **N** for "no" if it is not. If you put a Y in this field, then the requisition must go to David Epperhart, Director of Communication and Computer Services, for approval.
13. At the **Mail Check** field, enter an **N** if you do not want the check to be mailed by the Business Office. If you put a **Y** in the field or leave it blank, it is assumed that the Business Office should mail the check.
14. The **Vendor Contact** and **Fax #** fields are not relevant, and therefore, do not need to be filled out. Pressing **Enter** will move you through these fields.
15. The **Requested By** field needs to be filled out! Here you should enter the name of the person requesting the order. Pressing **Enter** after this field will move you to the second portion of your requisition form.

The upper portion of the Requisition Form has been filled out and now the second portion is

16. On the second portion of your form, you must press the **F7** function key to enter the actual item information.
17. When you press **F7**, the **Line Number** field will automatically be filled in for you.
18. In the **G.L. Account Number** field, you should enter the **General Ledger Account** number *(do not enter dashes or spaces)* from which you want the cost for the item(s) to be deducted. (Ex. 160906000)

19. The **Item Description** field is a required field! Please try to describe the requisition item(s) as fully as possible. There are 3 lines available for the Item Description field.
20. In the **Quantity Requested** field, you should enter the amount or number of the requested item needed. For example, if you were buying 3 pounds of paper, you would enter a 3 in this field. If you were ordering 15 cordless phones, you would enter 15 here.
21. In the **Unit of Measure** field, you should enter how the items are measured. For example, for 3 pounds of paper, you would enter 3 in the Quantity Requested Field, and Pound in the Unit of Measure field. For 15 cordless phones, you would enter 15 in the Quantity Requested Field, and Each in the Unit of Measure field.

```
                          Henderson State University
                          Requisition Entry          Pending Folder

Requisition #     : 993578        Date Needed      :
Requisition Date: 07/31/2001      Delivery Method  :              HSU Box #: 7732
Request Type    : RR              Computer Purchase: N
Prepay (Y/N)    : N               Vendor Contact   :
Vendor          : 42551                     Fax#   :
P.O. # Assigned :                 Requested By: Jennifer Hasley
                                  Document Total

Line Number            : 01
G.L. Account Number    : 1-6241-6000
Item Description       : Ball Point Pens
                       : Black "Legal" Ink
                       : Made by Meade
Quantity Requested     :      8.00
Unit of Measure        : pkgs
Cost Per Unit          :
Total Extended Cost    :
```

| ← | Page | → | ← | Item | → | List | Help | Out |

22. In the **Cost Per Unit** field, enter the cost of each item *(do not enter dollar signs!)*. For example, if one pound of paper costs $25, then you would enter 25 in this field. If each cordless phone cost $38.30, you would enter 38.30 in this field.
23. Once you have entered a Cost per Unit, the DPS system will automatically calculate the extended cost and place the amount in the **Total Extended Cost** field.

```
Line Number            : 01
G.L. Account Number    : 1-6241-6000
Item Description       : Ball Point Pens
                       : Black "Legal" Ink
                       : Made by Meade
Quantity Requested     :      8.00
Unit of Measure        : pkgs
Cost Per Unit          :           .880
Total Extended Cost    : 7.04
```

24. If you entered a Dummy Vendor in the Vendor Id field, you must now go to the notes section and enter the Vendor Information before going to the next step!

25. If you have additional items that you are ordering from the same vendor, you can press the **F7** key in the bottom portion of your requisition to add another Line Item. (Follow steps 16-22)
26. Once you have filled in all the information in your requisition, you are ready to store and send it. **TO DO THIS, YOU MUST PRESS THE FUNCTION KEY F10**. If you do not press **F10**, your requisition will not be received!

Viewing Requisitions:

1. Go to the **REQ** menu from the DPS Main Menu.
2. Press the **F9** function key**.** This will list all of the requisitions you have entered.
3. Requests with an ***** beside them mean that they have been approved, but are still pending

```
                          Henderson State University

    Requisition #    :  [        ]      Date Needed    :  [       ]
    Requisition Date:  [        ]       Delivery Method :  [       ]    HSU Box #: [     ]
    Request Type    :  [  ]            Computer Purchase: [  ]
    Prepay (Y/N)    :  [  ]            Vendor Contact  :  [           ]
    Vendor          :  [      ]                    Fax#  :  [           ]
    P.O. # Assigned :  [       ]       Requested By:  [             ]
    [                        ]          Document Total   [          ]

  Req. #    Req Date         Vendor Name                 Doc. Total    (Note)

 ■985693    08/23/2000
   985712    08/23/2000  WALMART  COMMUNITY  BRC
   985720    08/23/2000  DUMMY  FOR  TEMPORARY  VENDOR
   992849    07/02/2001  SOFTCHOICE  CORPORATION                 $42.62*
   993367    07/23/2001  DUMMY  FOR  TEMPORARY  VENDOR          $208.50*
   993479    07/26/2001  DUMMY  FOR  TEMPORARY  VENDOR          $149.95*
   993552    07/30/2001  CHARIOT  SOFTWARE  GROUP               $250.00*

 Record: 9571

  [ Options ]  [ ← ][ Page ][ → ]   [ ← ][ Item ][ → ]   [ List ]   [ Help ]   [ Out ]
```

4. To view information on a particular Requisition Form, highlight it in the list and press **Enter**.
5. To return to a blank requisition form, click on the **Out** button.

Editing a Requisition Form:

1. Once a Requisition has been stored and saved, you can still go back and edit it and make changes up until it has been approved! To do this, you must first select it from your list of requisition items by following Steps 1-4 on Viewing Requisitions. (see Viewing Requisitions)
2. Once you are inside the requisition form you want to edit click the **Options** button to view your list of choices.
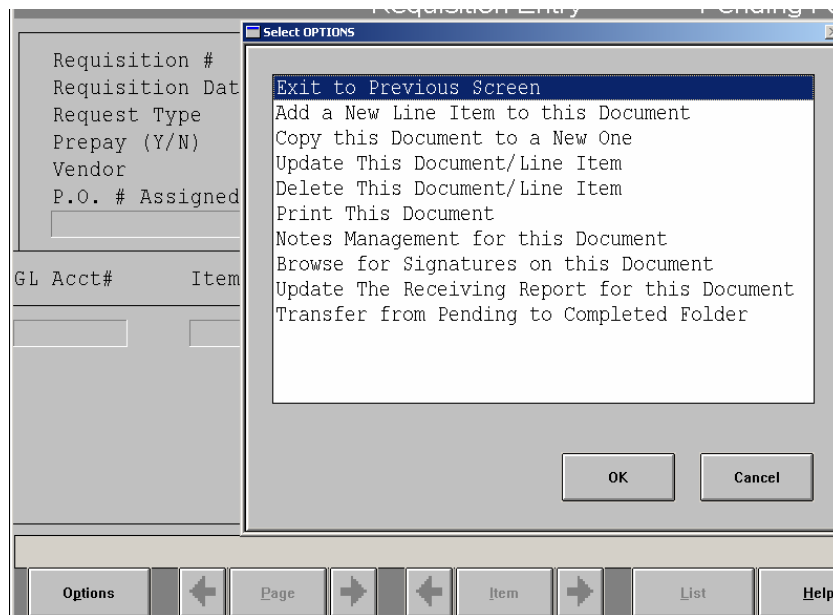
3. Select the Option **Update This Document/Line Item.**
4. Click **OK**.
5. If you need to update any of the information in the Header of your requisition form, select **Yes** in the option box to **Update Data in the Header Region**. If you only need to update one of your line items in the bottom portion of your requisition form, select **No**.
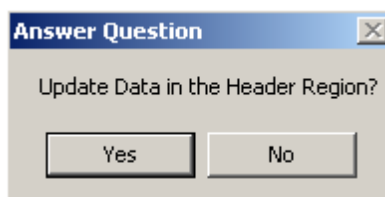

6. If you choose not to update the header region, the system will ask you if you would like to **Update Data in the Detail Region**. If you need to update this information, select **Yes**, if not, select **No**.
7. A blinking cursor will appear in the **Request Type** field of the Header Region if you choose to update it or the first line item in the Detail Region if you choose not to update the Header Region. Pressing the **Tab** key on your keyboard will move you between fields. Pressing the **Spacebar** over an entry in a field will clear it out. You can use your **mouse** to move back to fields.
8. When you have made all of the changes needed to your requisition form, you must press **F10** again to store and send the updated information. If you do not, your changes will not be received by purchasing.
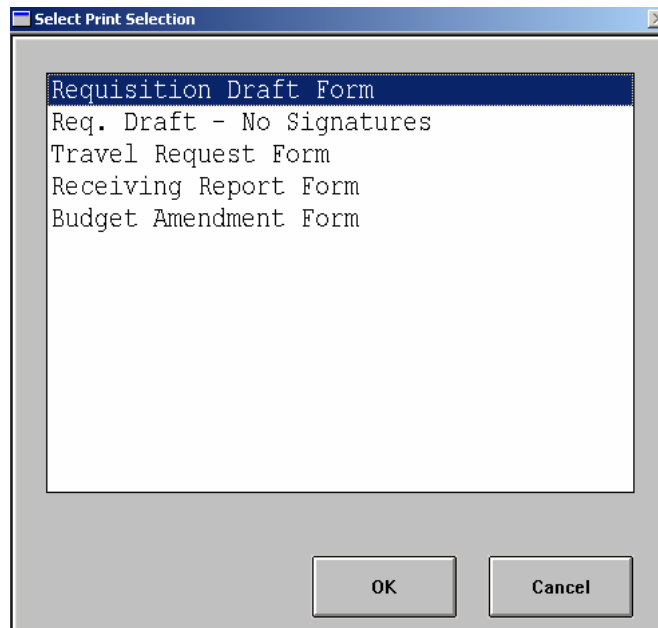
Delete a Requisition Form:

1. To Delete a Requisition Form, you must select it from your list of requisitions. (See Steps 1-4 on Viewing Requisitions) *NOTE: You cannot delete an item once it has been approved!*
2. Once you have selected your requisition, click the **Options** button and select the option **Delete This Document/Line Item**.
3. Click **OK**.

4. The system will then ask you to confirm if you want to delete the item. If you are sure you want to delete it, select **Yes**. If you do not want to delete the item, choose **No**.
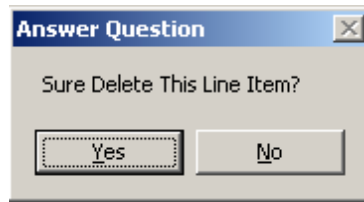
Print a Requisition Form:

16. To print a Requisition Form, you must select it from your list of requisitions. (Steps 1-4 on Viewing Requisitions)
17. Once you have selected the requisition you want to print, click the **Options** button and select **Print This Document**.
18. Click **OK**.
19. In the Print Selection menu, you should choose the option **Requisition Draft Form**.

20. Click **OK**

Add Notes to a Requisition Form:

1. The DPS system allows you to place notes inside a requisition form. These notes do not print and are only seen by the purchasing department. You can have more than one note in a requisition.
2. From inside the requisition form you want to add the note to, choose the **Options** button and select **Notes Management for this Document**.
3. Click **OK**.
4. Choose the **Options** button again inside the Notes Management window and choose **Add New Note Line**. (Notice you also have options here to **Read** or **Update** your notes)

```
                        Henderson State University
                        Requisition Entry              Pending Folder

  Requisition #    : 993647        Date Needed        :
  Requisition Date: 08/01/2001     Delivery Method    :              HSU Box #: 7732
  Request Type     : RR            Computer Purchase: N
  Prepay (Y/N)     : N             Vendor Contact     :
  Vendor           : 85694                       Fax#  :
  P.O. # Assigned  :               Requested By: jennifer hasley
  WALDRON HIGH SCHOOL              Document Total             $1,265.00

    Subject of Memo-Notation     Author of Note      Note Date       Note Flag
```

5. Give your notes a subject and type the notes in the spaces available.
6. When you are done, press **Enter**.
7. To return to the Requisition Form, press the **Options** button and select **Return to Previous Screen**.
8. Click **OK**.
9. Remember to **F10** from inside your requisition form when you add or make changes to store and send.

Check for Requisition Form Approval:

1. To see if a requisition has been approved, you must select if from your list of requisitions. (Steps 1-4 on Viewing Requisitions)
2. Click the **Options** button and choose the option **Browse for Signatures on This Document**.
3. The flag field will show you the current status of your requisition by each individual that must view it. The following are the flag options:

I	Shows Author of Requisition.	
P	Requisition is Pending.	
X	Requisition has not reached the individual.	
A	Requisition has been approved by the individual.	
R	Item has been Rejected.	

NOTES:

- Once someone rejects a document, all approvers above that person are automatically flagged as **R**.
- If a flag of **R** or **A** is shown, there will also be a date shown for the date of the action.

Document #	Approver	Approval Date	Flg	Description of Approval
993479	FAC_HASLEYJ		I	Document Author
993479	EPPERD	07/27/2001	A	Director - Comp. Services
993479	FIS_WARE		P	Purchasing Office

<p align="center">**Same for the Browse for Signatures Window**</p>

Check if a Requisition Item has been Purchased:

1. For a Requisition Item to be purchased, it must first be assigned a Purchase Order Number. This number can found in the **P.O. # Assigned** field. If a Purchase Order Number is in this field, then the item has been ordered!

Approving Requisitions:

1. To approve a document, select the **Approve** option from the **DPS** main menu.
2. Press the **F8** key.
3. Choose the option **Scan Available Documents for this User**.
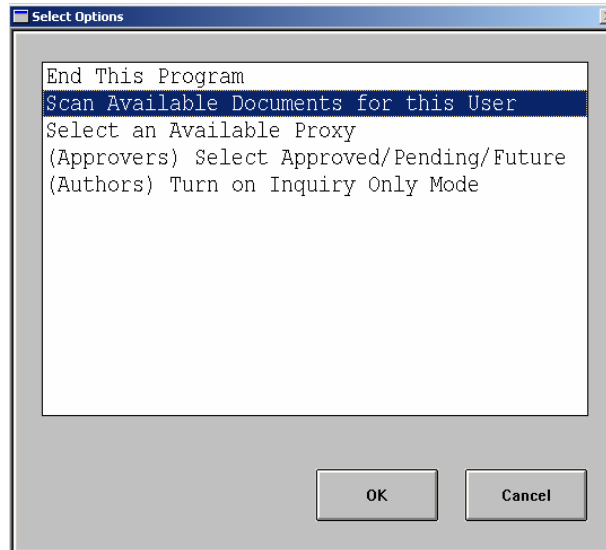
4. A list of documents that you are authorized to approve will appear.
5. Select the document you want to view from the list and press **Enter**.
6. Press the **F8** key again to display your options.
7. Choose the option to either **Approve This Document** or the option to **Reject This Document.** *(NOTE: You also have the option to add or Review Notes on the Document.)*
8. A message line will then appear at the bottom of the screen displaying whether you approved or rejected the item.

Acting as a Proxy for an Approver:

1. You can act as a Proxy for an Approver if you have been given proxy privileges by that approver.
2. To change from your account to a proxy, select the **Approve** option from the DPS Main Menu. Then, press the **F8** key and select the option to **Select an Available Proxy**.
3. A new screen will appear listing the proxies that are available to you. Choose the appropriate proxy and press **Enter**. Your screen will now show the name of the user you are approving for in the top left-hand corner.
4. Press **F8** again and choose the option to **Scan Available Documents for this User**.
5. Any pending documents will now show.
6. Select the document you want to view and press **Enter**.
7. Press the **F8** key and choose the option to either **Approve This Document** or the option to **Reject This Document.**
8. A message line will then appear at the bottom of the screen displaying whether you approved or rejected the item.

DPS Facts & Questions:

1. Do I need to order the item once I have entered it in the DPS system?
   NO! Purchasing will place the order for you! (Hence the name, *Purchasing*) If you place the order and then enter a DPS request for it, you need to let Purchasing know that you have

already placed the order for the item. You can include this information in the Notes Section of your Requisition Form.

2. Who do I contact if I have questions concerning a purchasing item?
    If you have questions regarding an item that you have entered a requisition for, then you must contact Purchasing at ext. 5112. If you have questions concerning entering a purchasing request or just using the ALPHA in general, you can contact the Computer Help Desk at ext. 5678 or Jacob Mills at ext. 5609.
3. What can I do if I need to enter more detail about a purchasing item than the spaces in the Item Description field allows?
    You should enter any additional information in the Notes Section of the Requisition Form.

For Help

If you have any trouble with anything throughout this booklet, please contact the HelpDesk for assistance.

HelpDesk contact info:

Phone: (870) 230-5678
E-Mail: Helpdesk@hsu.edu
Location: 1st floor of Womack with Computer Services